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Report Highlights:
The impact of the Czech Republic's accession to the EU will be long-term as Czech consumers' disposable incomes will grow, and demand for U.S. food and beverage products will grow likewise. Consumers demand variety, and although price still plays a key role for many customers, quality is becoming increasingly important. Demand for U.S. organic and high quality beans, lentils, rice, nuts, fruit, fish and seafood will increase with a growing trend toward healthier eating. This report contains detailed information on how to import food products into the Czech Republic, market prospects, and points of contact.

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I. MARKET OVERVIEW

Economic growth has reached over 3% in the past three quarters and is expected to continue with stabilized household spending and strong dynamic of investments after the EU accession on May 1, 2004. The standard of living in the Czech Republic is slowly reaching the level of surrounding western economies. In the first quarter of 2004, household spending was up by 3.9% compared to the previous year with the Ministry of Finance expecting only a slight decrease and predicting a 3.5% increase for the rest of 2004 and 3.4% for 2005. Total investments increased by 9.5% in the first quarter of 2004 and are expected to grow, though at a slower pace at 7.7% in 2004 and at 5.5% in 2004.

By joining the EU on May 1, 2004, the basic level of value added tax (VAT) changed from 22% to 19% and some items were moved from the decreased 5% level to the basic level of 19% (e.g. sugar, coffee; prices of food in restaurants).

In terms of consumer preference and spending, the EU accession does not represent any kind of breakpoint but instead reflects a continuation of a process started many years earlier. The impact of accession will be more long-term as Czech consumers will have higher disposable incomes with stronger demand for U.S. products expected. Consumers demand variety, and although price still plays a key role for many customers, quality is becoming increasingly important. Demand for U.S. organic and high quality beans, lentils, rice, nuts, fruit, fish and seafood will increase with a growing trend toward healthier eating.

Tariff rates changed on May 1, 2004, and the Czech Republic now applies the EU external common external tariff for third countries. Some U.S. products will face higher tariffs (e.g. tobacco, dried fruits, nuts, and fish) while other products will enjoy lower tariffs (e.g. whiskey, cigars, and wood products).

The Czech Republic is a net importer of agricultural products (live animals, food, drinks, and tobacco). Total import of agricultural products in 2003 was $2.2 bill, out of which $56 mil was from the U.S. (structure of imports is shown in the table in Section IV.) Total export in 2003 was $1.6 bill, out of which $25 mil to the U.S. (mainly beverages and confectionery). Over 90% of trade is within the enlarged EU 25 countries.

Key demographic developments and their impact on consumer buying habits

The number of single and childless households is on the rise. Primarily due to young people waiting longer before they have a family and more women entering the professional job market. The result is a higher demand for convenience products, frozen foods, and more frequent eating out. Recently, fresh, chilled, and ready-made meals have become popular. Additionally, with the boom in hypermarkets and larger home refrigerators, once-a-week food shopping is quickly replacing daily purchases of fresh food items.

Food expenditures and food consumption trends

Czech expenditures on food have been declining with the strengthened economy – while Czechs spent over 30% of their disposable income on food in 1989, last year it was close to 20%.

The table shows different eating habits in 1996 and in 2002 (more recent data is not available):

Item	**Consumption in kg per capita in 1996**	**Consumption in kg per capita in 2002**	**% Index (2002 compared with 1996)**
Meat total	85.3	79.1	92.7
Out of which: Pork	49.2	40.5	82.3
Beef	18.2	10.9	**59.9**
Veal	0.3	0.2	66.7
Poultry	13.6	23.9	**175.7**
Fish total	5.2	5.2	0
Vegetable edible fats and oils	15.8	16.0	99.4
Milk and milk products	199.2	220.6	110.7
Eggs (pieces)	276	298	107.9
Cereals (in flour)	113.8	101.51	89.5
Sugar	39.5	40.0	101.3
Potatoes	77.2	76.0	98.4
Pulses	2.0	2.1	105.0
Vegetables	79.5	84.0	105.7
Fruit	73.5	69.4	94.4
Spirits (40%)	8.0	8.2 (2001)	102.5
Beer	157.3	156.9 (2001)	99.9
Wine	15.8	16.2 (2001)	102.5
Non-alcoholic beverages	127.0	220 (2001)	**173.2**

Alcoholic beverages

The alcoholic beverage market continues to be dominated by beer, although in recent years wine and lighter alcoholic drinks have become popular. New drinks fashions and increased health concerns are slowly driving down beer consumption, although per capita consumption of over 162 liters still remains the highest in the world.

Wine sales are increasing due to the rising popularity of wine as an alternative to beer and spirits. Wine per capita consumption increased by 21% since 1997 (15.9 liters per capita in 1997 and 19.2 liters in 2002). Despite this increase, wine consumption is still low compared with other European countries. Consumption of red wine has dramatically increased, and accounted for almost 36% of total wine volume in 2002. Consumers are increasingly seeking quality, and are beginning to show an interest in wine origins, vintage and producer pedigree. They are also reading more information provided on bottle labels, which is opening up opportunities for suppliers to offer a wider range of products, and influence consumer choice through better designed labels and supporting information.

The Czech wine industry can supply only about 50% of demand, with the remainder being imported. Within the imported contingent, the share held by red wine is growing. The most important exporters of wine to the Czech Republic were previously Spain and Hungary, but now wine is increasingly sourced from all over the world, including Australia, California and South Africa, as well as France and Italy.

Ordinary wine comes in 1-liter bottles, while better quality wines are sold in 0.7- or 0.75-liter bottles, like in the EU. In the past wine drinking was reserved more for going out and special occasions. The fact that retail sales are growing faster than sales in hotels and restaurants means that wine drinking is increasingly becoming a part of everyday life. Drinking good wine has become fashionable, particularly among affluent professionals. The majority of consumers remain, however, price sensitive. Cheap and low quality wines are also imported, and often sold in cardboard boxes. Supermarkets and hypermarkets play a key role in modern wine distribution in the Czech Republic, but specialist shops – vinoteke – also have an important role in educating consumers about quality wines.

Market size and growth since 1998 (in $mil.)

	1998	2000	2003
Alcoholic drinks, total	2,768	2,691	4,476
Beer	1,324	1,267	2,112
Cider	-	-	-
Flavored alcoholic beverages	-	-	-
Wine	442	458	774
Spirits	1,002	966	1,590

Distribution (in %)

	1997	2003
Supermarkets/hypermarkets	25.2	52.1
Independent food stores	49.3	22.7
Convenience stores	10.9	6.4
Discounters	4.5	4.4
Specialists	6.4	10.2
Direct sales	0.7	2.3
Others	3.0	2.0

Packaged food

The share of packaged food in total food expenditure accounts for about 65%. Demand for packaged food continually increases and calls for quality products and a wide product range of various formats and flavors. Ready meals showed a high growth rate of 10.5% in value terms in 2003. Both local and foreign manufacturers keep up with this trend and offer a great variety of time saving ready meals.

Since the EU accession in May 2004, there is a trend toward market consolidation. Many small producers already make products under license for larger manufacturers and for private labels, while other small domestic companies that did not meet EU standards disappeared from the market.

Market size and growth since 1998 (in $mil.)

	1998	2000	2002	2004
Packaged food, total	3,096	2,862	3,636	5,075
Confectionery	308	259	323	439
Bakery products	551	468	564	776
Ice cream	83	71	61	127
Dairy products	716	676	848	1,157
Sweet and savory snacks	67	60	79	109
Snack bars	1.8	1.8	2.5	3.7
Ready meals	94	100	141	226
Soup	63	56	59	71
Pasta	51	41	51	64
Noodles	10	12	17	24
Canned/preserved food	260	276	377	567
Frozen processed food	151	163	228	360
Dried processed food	168	155	186	246
Chilled processed food	200	205	285	432
Oils and fats	385	324	392	505
Sauces, dressings and condiments	141	132	168	226
Baby food	23	23	32	43
Spreads	42	47	60	84

Distribution (in %)

	1998	2004
Supermarkets/hypermarkets	32.2	56.1
Independent food stores	48.9	20.2
Convenience stores	5.3	8.0
Internet sales	0	0.2
Discounters	5.1	10.7
Others	8.4	4.8

Pet food

Pet ownership in the Czech Republic has increased over the past several years, especially in urban areas. An estimated 38% of Czech households own at least one dog, while 19% own one or more cats. Over 70% of dog owners and 45% of cat owners bought industrially prepared food in 2002, although this was still low in comparison with EU countries, therefore there is still a strong growth potential in the pet food market. Yearly sector growth is around 10%. The growth is driven by lower prices and growing popularity of mid-priced and economy segments. Innovation is driving force in stimulating growth in the Czech pet food market together with the demand for nutritional, functional, and enhanced foods. This trend will continue.

The overall cat and dog food market is relatively consolidated, with the top two producers accounting for around 45% of total value sales. The major multinationals (Master Foods and Nestle) have a significant share of sales thanks to early market entry, wide product portfolios, and strong advertising.

Supermarket and hypermarkets are the leading distribution channels of pet food and pet care, accounting for around 45% of sales value.

Market size and growth since 1998 (in $mil.)

	1998	2000	2002	2004
Pet food and pet care products, total	63.0	64.3	87.2	128.1
Dog and cat food	53.7	55.4	75.2	110.6
Other pet food	1.8	1.8	2.6	3.7

Distribution (in %)

	1998	2004
Pet superstores	0	2.1
Pet shops	31.6	32.1
Veterinary clinics	3.4	5.7
Supermarkets/hypermarkets	26.5	45.6
Other food stores	33.5	10.0
Other non-food stores	5.0	4.4

Soft drinks

Consumption of soft drinks increased from 129 liters per head in 1998 to 183 liters in 2003, a 42% increase. Carbonates (50%), bottled water (37.6%) and fruit and vegetables juices (10.6%) are the most popular soft drinks in the country. Consumption grew in all sectors except for concentrates. There is a growing consumer interest in healthy living, which increased sales of bottled water. Per capita consumption of bottled water increased by 63%, from 41 liters in 1998 to 67 liters in 2003. Per capita consumption of fruit and vegetable juices grew by 52% from 21 liters in 1998 to 32 liters in 2003. This sector was supported by the introduction of multivitamin juice drinks and functional 100% fruit juices and nectars.

The market for soft drinks is one of the most dynamic in the Czech beverages industry. In 2003, Czech consumers will consume only 17% of their soft drinks volume in on-trade outlets and a huge 83% at home. Sales of soft drinks have been boosted by the increased availability of drinks sold in PET bottles, which have made the price of drinks in larger sizes more attractive, as well as making storage and handling for retailers much easier. Sales were also supported by the expansion of multiple stores, as well as the introduction of new flavors.

Market size and growth since 1998 (in $mil.)

	1998	2000	2003
Soft drinks, total	768	765	1,299
Carbonates	420	422	694
Fruit/vegetable juices	182	163	285
Bottled water	112	118	201
Functional drinks	10	17	41
Concentrates	34	28	44
Ready to drink tea	9	14	29
Ready to drink coffee	-	2	4.7

Distribution (in %)

	1997	2003
Supermarkets/hypermarkets	25.2	53.3
Independent food stores	57.4	15.8
Discounters	8.0	15.2
Convenience stores	3.1	6.5
Vending	4.0	6.9
Others	2.4	2.2

Advantages and Challenges for U.S. Suppliers on the Czech Market:

Advantages	Challenges
Improving economic situation and growing purchase power	Higher competitiveness of some EU products due to elimination of tariffs between the EU and CR (e.g. wine tariff dropped from 38.5% to 0 after the accession, which makes European wines cheaper)
High quality of U.S. products and growing trend toward eating what is healthier; an opportunity for U.S. organic products	EU tariff rates are higher than were Czech tariffs on some products (e.g. seafood, dried fruit and nuts)
New investments throughout the country will create new demand in smaller cities and rural areas	Relatively small volumes with high transportation costs
Good infrastructure, most importers speak English	Unawareness of U.S. products and high promotional costs
Changing lifestyle, eating habits – eating out is more and more popular	Low appreciation of high quality of U.S. products (e.g. nuts); price still plays a key role
Boom of large and modern hypermarkets that carry a wide range of products (30-50,000)	Food safety issues (fear of GMO)
Willingness to try new products; innovative products and packaging increase demand	Lower purchase power compare to the EU

II. EXPORTER BUSINESS TIPS

Local business customs

Food retailers have their own purchasing sections and buy products from either domestic suppliers or Czech importers. However, with the EU accession and free trade within EU 25, it can be expected that retail chains will seek suppliers of cheaper and better quality products anywhere in the enlarged EU. So far they buy U.S. products from Czech importers specialized on various commodities. In the future they may seek large European wholesalers carrying U.S. products.

General consumers tastes and preferences

Typical Czech cuisine is quite heavy, usually consisting of meat and dumplings with sauce, has been declining. There is a growing demand for healthier products, which results in decreased consumption of red meat, especially beef; increased consumption of poultry, mainly chicken; substitution of butter and other animal fats with vegetable oils and margarine; increased consumption of vegetables and some fruit. Consumers demand healthier, light alternatives to traditional dairy products, as well as products enriched in vitamins, minerals and fiber elements, new flavors and innovative packing. Confectionery manufacturers continue to introduce new products with healthier ingredients, such as yoghurt and fruit, while also offering more sugar-free products. Even though organic products still represent a relatively low share on total food consumption, it is a growing market segment.

Food standards and regulations

Please see Food and Agricultural Import Regulations and Standards report EZ4019. It may be found at http://www.fas.usda.gov/scriptsw/attacherep/default.asp

General import and inspection procedures

All products exported to the Czech Republic must comply with EU import regulations. Complete information on EU import rules for food products may be found at:
http://useu.be/AGRI/usda.htl

Incoming goods go either to the customs storage or a freight forwarder's facility at the airport (the Czech Republic has only one international airport). Storage is carried out under the supervision of a customs officer who checks the documents and compares them with commodities. Food inspectors do not routinely check packaged foods, however, custom officers may take samples to check for ingredients. Veterinary certificates are bi-lingual and may be found at the State Veterinary Administration webpage:
http://www.svscr.cz/dokumenty/eu/dovoz/dovoz_en.html

III. MARKET SECTOR STRUCTURE AND TRENDS

Retail sector

In 2003, annual turnover for the Czech retail sector amounted to $11 billion with annual growth of 6% per year. The sector has reached a high level of concentration with 74% of consumers shopping at one of the top 10 stores and turnover for the top 10 amounting to 55% of total sales. This trend will continue. The rapid growth and filling of the market made room for an expansion of specialty retailers and discount stores. Czechs mostly prefer to shop at hypermarkets, followed by discount stores, supermarkets and small self-service grocery stores.

Foodservice market

The Czech foodservice market reached over $4 billion in sales in 2003. Consumer expenditures on consumer foodservice grew fast, and by 2003, they represented over one third of overall expenditure on food.

The sector is highly fragmented with up to 74% of all sales generated by stand-alone units in 2003. There are over 55,000 foodservice outlets in the Czech Republic, only 11% are institutions (schools, hospitals, cafeterias, army), the rest are commercial restaurants. The middle and upper segments of hotels and restaurants are on the rise (by 45% between 1998 and 2001). Institutional outlets represent almost 30% of total sales. 50% of all restaurants are low category pubs, which only serve limited food.

Fast food chains have 77 outlets and are mainly in big cities and along the major highways. McDonald's is the leading foodservice operator and brand in the Czech Republic. In 2003, it accounted for 1.4% of all consumer foodservice value sales, 16.5% of fast food sector sales, and 80.2% of all chained operator sales.

Food processing

As a result of the EU accession, food processing will be concentrated. Many small companies that do not comply with EU hygienic standards were closed down before May 1, 2004, especially meat and dairy processors. Those that survived are usually newly renovated and will gain higher market share. With increased consumer purchase power and demand for higher quality products, processors will be forced to use higher quality ingredients, which creates a market for U.S. exporters.

Domestic industry capacity versus availability of supplied products

In the 1990s multinational companies (Master Foods, Unilever, Danone, Nestle, Phillip Morris, Coca Cola, Pepsi Cola) purchased many local food production facilities and invested in modernization. Usually these companies have plants in different countries focusing on different products (e.g. Master Foods produces snack bars in the Czech Republic and pet food in Hungary) and supply the whole region.

Czech food industry is strong in production of beer, mineral water, meat products, dairy, and confectionary. Sea fish, seafood and many fruit and vegetables have to be imported since geographic location and climatic conditions do not allow domestic production.

Trends in promotional/marketing strategies and tactics

Promotion of food products appeared with the boom of hypermarkets in the second part of the 1990s and became increasingly important with the stronger competitiveness of retail chains. Retailers use several promotional tools: they distribute their two-week promotional leaflets to households, have in-store tasting, and display products in special promotional aisles. TV commercials are also becoming popular; they are usually used by multinational companies (e.g. Danone) or by alcoholic beverages producers (e.g. Jim Beam), who can afford to pay high fees for this type of advertising.

Trends in tourism sales, holiday gift sales, and Internet sales

The Czech Tourism Office registered over 16.5 million overnight stays by foreigners in 2003. Around one quarter of foreigners are Germans, followed by Italians, Austrians, French, Brits, Dutch, Poles, and Americans. The most popular destination is the capital city Prague, which is also a center of many businesses. Retailers usually introduce new or more expansive products in Prague before they bring them to other Czech cities. Large restaurant capacity in Prague is an opportunity for U.S. fish and wine. Internet food sales are marginal.

IV. BEST HIGH-VALUE PRODUCT PROSPECTS

The following high value products are considered to have good market prospects:

Dried fruits and nuts (almonds, raisins, prunes, pistachios, pecans, peanuts)
Fish and seafood (live lobster, scallops, squid, salmon, mussels)
Alcoholic beverages (distilled liquor, wine, alcohol mixtures for cocktails)
Rice (wild rice, rice mixes)
Various mixes and ingredients (e.g. for ice cream, baking ingredients)
Frozen juice concentrate
Tropical fruit (red grapefruit)
Sauces and spreads (salsa, peanut butter)
Meat (horse, non-hormone treated beef)
Organic products
Pet food
Tobacco

Imports to the Czech Republic in 2003:

HTS Number	Item	Czech total import in MT in 2003	U.S. share in % (in volume) in 2003	U.S. share in % (in volume) in 2002	Czech total import in mil. USD in 2003
0303	Fish, frozen, excl. fillets	8,621	**5**	2	9.6
0304	Fish fillets, chilled or frozen	19,995	**4.6**	7	30.8
0802	Nuts	6,874	**37.9**	37	22.6
080620	Grapes, dried	4,900	**8.9**	9	4.3
1005	Corn	6,803	**5**	3	15.5
1006	Rice	59,822	**1.3**	3	16.6
2106	Food preparations, nonspecific.	44,477	**3.8**	5	135.9
2204	Wine	106,791	**0.2**	0.1	58.7
2208	Spirits and liqueurs	17,776	**7.4**	9	45.1
2309	Pet food	102,540	**1.2**	1	81.5
2401	Tobacco unprocessed	16,244	**16.3**	24	51.3
4407	Wood sawn/chipped/sliced	250,452	**0.2**	0.3	77.1
4408	Veneer sheets/sheets of plywood	12,183	**4.2**	6.5	25.6
5201	Cotton not carded or combed	52,887	**1.3**	2	69.6

V. KEY CONTACTS AND FURTHER INFORMATION

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TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION

The following table shows data from 2003:

Agricultural Imports From All Countries ($Mil)/ U.S. Market Share (%)	2,250 (3)
Consumer Food Imports From All Countries ($Mil)/ U.S. Market Share (%)	1,596 (2)
Edible Fishery Imports From All Countries ($Mil)/ U.S. Market Share (%)	80 (5)
Total Population (Millions)/ Annual Growth Rate (%)	10.2 (-0.1)
Urban Population (Millions)/ Annual Growth Rate (%)	7.4 (0)
Number of Major Metropolitan Areas	1
Size of the Middle Class (Millions)/ Growth Rate (%)	N/A
Per Capita Gross Domestic Product (U.S. Dollars)	$5,810
Unemployment Rate (%)	10.2%
Per Capita Food Expenditures (U.S. Dollars) – food and beverages	$800
Percent of Female Population Employed	56
Exchange Rate (US$1 = X.X local currency)	25.8

(Exchange rate: September 2004: $1 = 25.6 CZK)

TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%)	**2,239 (3)**
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%)	**1,396 (2)**
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%)	**82 (3)**
Total Population (Millions) / Annual Growth Rate (%)	**10.2 (-0.1)**
Urban Population (Millions) / Annual Growth Rate (%)	**7.4 (-0.1)**
Number of Major Metropolitan Areas	**1**
Size of the Middle Class (Millions) / Growth Rate (%)	**N/A**
Per Capita Gross Domestic Product (U.S. Dollars)	**$5,650**
Unemployment Rate (%)	**9.2%**
Per Capita Food Expenditures (U.S. Dollars) – food and beverages	**$700 (yr 2001)**
Percent of Female Population Employed	**56%**
Exchange Rate (US$1 = X.X local currency)	**27.4**

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

Czech Republic Imports (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S Market Share		
	2000	2001	2002	2000	2001	2002	2000	2001	2002
CONSUMER-ORIENTED AGRICULTURAL TO	1.048	1.150	1.396	21	23	25	2	2	2
Snack Foods (Excl. Nuts)	126	144	163	1	1	1	0	0	0
Breakfast Cereals & Pancake Mix	8	8	11	1	1	1	1	3	1
Red Meats, Fresh/Chilled/Frozen	36	38	52	0	0	0	0	0	0
Red Meats, Prepared/Preserved	14	15	18	1	1	1	0	1	1
Poultry Meat	21	25	33	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	40	48	66	1	0	1	0	0	0
Cheese	31	36	47	0	0	0	0	0	0
Eggs & Products	5	5	4	1	1	1	9	9	6
Fresh Fruit	148	167	206	1	1	1	0	0	0
Fresh Vegetables	95	105	137	0	0	1	0	0	0
Processed Fruit & Vegetables	93	98	118	3	3	3	3	3	2
Fruit & Vegetable Juices	24	21	28	1	1	1	2	1	1
Tree Nuts	16	18	22	4	5	7	25	28	33
Wine & Beer	36	43	56	1	1	1	0	0	0
Nursery Products & Cut Flowers	46	51	65	1	1	1	2	2	2
Pet Foods (Dog & Cat Food)	12	17	22	1	1	1	1	6	3
Other Consumer-Oriented Products	296	313	348	12	12	12	4	4	4
FISH & SEAFOOD PRODUCTS	68	78	82	1	1	3	0	1	3
Salmon	2	3	4	1	1	1	3	5	8
Surimi	3	3	4	0	0	0	0	0	0
Crustaceans	2	3	3	0	0	1	0	0	0
Groundfish & Flatfish	23	30	27	1	1	2	0	2	8
Molluscs	1	1	1	0	0	0	0	0	0
Other Fishery Products	36	38	43	1	1	1	1	0	0
AGRICULTURAL PRODUCTS TOTAL	1.798	1.937	2.239	67	68	57	4	4	3
AGRICULTURAL, FISH & FORESTRY T	2.153	2.303	2.660	74	73	65	3	3	2

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office